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ABSTRACT

The key to long-term institutional effectiveness is a comprehensive planning process that identifies a few vital goals that can be measured by an institution. Effective strategic planning involves five key elements: process-based planning, a systemic approach, integration with the budget process, an effective deployment process, and appropriate measures. In process-based planning, a 10- to 20-member planning group should be created that represents all levels of the organization and all of whose members should be capable of developing a vision for the college, understanding other group members' mental models, and thinking in wholes. Using a systemic approach means that planning efforts are focused on the institution as a whole and that interrelationships and patterns of behavior are examined to determine their effect on operations. The college's budget should be understood as the vehicle with which the institution can move forward toward its vision, while the deployment process should ensure that all parts of the institution are working on the few vital strategies identified as key to institutional success and that individual department initiatives are visible. Finally, visible measures should be developed that assume that continuous quality improvement strategies will be implemented and that the process will include accountability. Contains 12 references. A sample goal matrix for Misconsin's Milwaukee Area Technical College is appended. (BCY)

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A Comprehensive Planning Model

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A Comprehensive Planning Model

James B. Rieley
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A comprehensive strategic planning process should identify a few, critically vital, key goals that are measurable for an institution. This is the key to long-term institutional effectiveness. This paper will outline the elements necessary to develop a comprehensive planning model, as well as identify how these elements can leverage the planning efforts of an institution.

There are five key elements that, when put together in the right combination, lead to effectiveness in strategic planning for institutions of higher education. These five elements are: process-based planning, a systemic approach, integration with the budget process, an effective deployment process, and appropriate measures. Without any of the five elements organizational strategic planning efforts will lead to wasted resources, lack of organizational alignment, and the inability of the institution to meet strategic goals, and therefore the inability to effectively satisfy the institutional mission.

The object of an effective planning process is to develop a list of "the vital few" key goals that will be critical for long-term institutional success. It is not to develop a long list of goals. The rationale for this statement is that when an institution develops too many goals, the ability of the institution to meet the goals is severely diminished. Additionally, if the goals are developed without a systemic approach the planning efforts will lead to a plan that does not focus on the institution as a whole, and consequently lead to fragmentation of success efforts. If an institution does its strategic planning without first integrating the budget process into the overall planning effort, the results will be ineffective and lead to institution chaos. Without an effective deployment process, the planning efforts will result in confusion as to the goals and the rationale behind them, and again, fragmentation of efforts. If the plan does not include appropriate measurements and accountabilities, the planning efforts will be considered not important and will reduce the potential for long-term institutional success.

The Planning Process

To do effective strategic planning, it is critical that the actual planning efforts are done by a cross-sectional, representative group of people who will eventually be responsible for the implementation of the plan. In most institutions, this means bringing people into the planning process who would traditionally not have any substantial input into the process. This means, in a unionized environment, including members of the union in the process. Additionally, it means that the planners must be institutional people who can access both the data needed for the planning process, as well as have specific information as to how the institution functions.

A typical planning group would consist of between 10 – 20 people. This group should represent the critical processes of the organization, from both management and labor, from senior levels of the institution to front line workers. The group doing the planning should have knowledge of the tools used in effective planning, specifically, the management and planning tools. Additionally, the planning process should utilize the services of a trained facilitator. The facilitator's responsibility would be to keep the planning group focused on the planning process and not on any political agenda. Each of the members of the strategic planning group need three core capabilities – vision, understanding, and thinking in wholes. These capabilities can be viewed as the legs of a stool. Without any one leg, the stool will not stand. Without any one capability, the planners will not be able to develop an effective set of strategic initiatives that will lead the institution into the next century (see figure 1).

(figure 1)

Vision refers to the capability to clearly see a future. Implicit in this is the fact that there is no one future to see, but potentially, many futures that an institution may encounter. Without a vision for the future of an institution, it is unreasonable to develop strategic initiatives that will move the institution toward the vision. Without a vision for the future, an institution will languish, reliving its past over and over again.

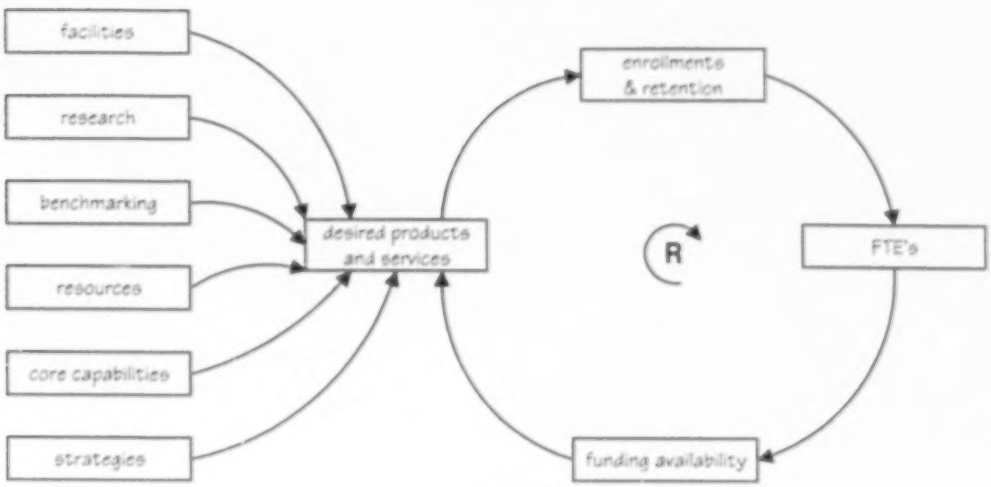
Understanding refers to the capability to be open to a dialogue that can reveal the mental models of the others on the planning group. Mental models are the deep-seated beliefs and assumptions of the world that we carry in our minds. It is our mental models that drive our personal decisions. Without the capability to understand our deep-seated beliefs and assumptions, personal, departmental, and divisional agendas will result in any comprehensive planning effort being mired in politics.

Thinking in wholes is the capability to see the institution as an entire system, as well as to see the institution as a collection of dynamic relationships whose interaction either enables or inhibits an institutions ability to be effective over time.

The central focus of the planning process should be two things – the long-term institutional vision and how best to satisfy the institutional mission. To be able to utilize this focus requires that the institution has both a vision and mission, and that the planning group has a sound understanding of what the vision and mission are and what they mean. Without a clear understanding of a long-term vision (the direction that the institution is trying to move toward) or a clear understanding of the institutional mission (the purpose for the organization to exist), the planning efforts will be disjointed and ineffective.

A critical part of the planning process is the identification of key institutional success factors. These success factors are the elements of the institution that are necessary to ensure long-term institutional viability. In our environment, these success factors include the effective utilization of facilities, research, benchmarking, resources, strategies, as well as specific core capabilities of the institutional population. It is the successful coordination and focus on these key success factors that, when applied effectively, can

result in a desirable mix of products and services that will contribute to long-term institutional effectiveness and customer satisfaction. Institutional effectiveness and customer satisfaction lead to higher enrollments and retention, and therefore more accessibility of funding. This, in turn, leads to higher potential for effective application of the key success factors (see figure 2). (Daniel Kim; *The Systems Thinker*)



(figure 2)

The underlying belief in figure 2 is that if the institution is able to provide the products and services desired by the institutional customers, there will be more customers enrolling and being retained. This will lead to higher FTE counts, which leads to additional funding, therefore, providing a higher level of ability to provide more desired products and services mix. The input necessary to begin this reinforcing cycle is the key success factors for the institution. Without the application of any of the key success factors, the desired mix of products and services will not be able to be developed, and therefore the virtuous cycle will become a vicious cycle with each element declining instead of growing.

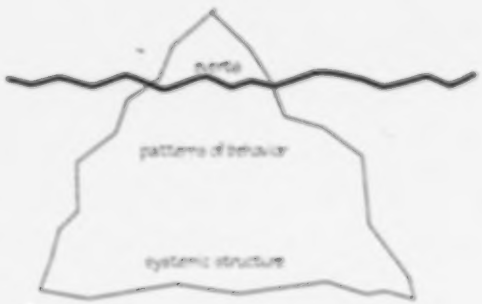
A Systemic Approach

A systemic approach in planning means several things. First, a systemic approach focuses planning efforts on the institution as a whole. To do organizational planning requires just that, planning for the entire institution. Although an institution is a collection of departments and divisions that are composed of people, resources, facilities, and customers, it is not rationale to assume that effective institutional planning can be done by focusing on just some of the component elements. The basis for this belief is found in one of the laws of systems thinking - "you cannot cut an elephant in half." This means that the organization is only an organization when it is viewed as a whole. When you cut an elephant in half, you do not get two smaller elephants; you get just elephant parts. This is true with institutions as well. Planning that focuses only on parts of an institution will produce ineffective results. The institution potential can only be reached when the institution is viewed as a cohesive unit.

Second, a systemic approach gives the institution the ability to look at the interrelationships and patterns of behavior that effect the ability of the institution to satisfy its mission. To understand the interrelationships and patterns of behavior require an understanding of the systems thinking model. This model graphically looks like an iceberg (see figure 3). (Peter Senge; *The Fifth Discipline Fieldbook*)

The top of the iceberg is the part that is visible. This is where we see the events that are present in the institution. These events may include things that are deemed to be either good or bad, and at some times, the things are both good and bad. This can be possible because something that is considered positive for part of an institution can be considered negative for another part. It is the events of an institution that generate traditional institutional problem-solving efforts. Unfortunately, institutional problem solving can be equated to fire fighting, and over time, fire fighting results in the loss of resources and institutional alignment. Problem solving and fire fighting are the same as reacting – reacting to situations when they occur. When an institution lives in an event mode, it is doomed to continue to react; to continue to fight the same fires semester after semester,

year after year. As can be seen in the model, below the event level are patterns of behavior.



(figure 3)

It is the patterns of behavior that, over time, generate the events that are visible in an institution. Positive patterns of behavior lead to positive events; negative patterns of behavior lead to negative events. Patterns of behavior are more than just the behaviors of how we act. Patterns of behavior include how we understand, how we work together, and how we plan. It is the patterns of behavior over time that lead to the trends that we see in our institutions.

Below the pattern level are the systemic structures in place in our institutions. Systemic structures are not just physical structures such as facilities, but are also the processes and procedures that have been put in place over time. Every time a new policy decision or procedure is implemented, it changes the systemic structure of the institution. It is these structures that we put in place that create the environment that generates the patterns of behavior and trends that result in the events we see in our institutions. Without an understanding of the dynamics of this model, our institutions will be condemned to continue to plan based on events, and therefore continue to get the same results that we have seen in the past – ineffective ability to address the challenges facing our institutions of increased competition, increasing regulatory demands, decreasing revenue sources, and increasing demands from customers.

Tied directly to the model are several important systems thinking "laws." These laws help explain the dynamic interrelationships of actions in organizations and why

institutions sometimes sense that they are reliving some of the same events over and over again, semester after semester, year after year. They include:

Cause and effect are not closely related in time and space

As we evolve our policies and procedures, the effects of those decisions may not be fully seen for semesters or even years. One of the things that prevent high levels of institutional effectiveness are the decisions that were made in the past. It is not that these decisions were necessarily bad. It is a situation caused by the fact that when the decisions were made, the long-term, systemic effects of those decisions were not taken into consideration. The decisions were made to react to specific events, and regardless of how well the decision addressed the event at the time, the impact of the decision will effect the institution from that day forward.

There are no right answers

The belief that there are "right" answers stems from the belief that someone has "the answer." This belief is fostered in our educational system. There are right answers in computations, but institutions are not just mathematical equations. Institutions are living organisms that are effected over time by the decisions that we make. Believing that there are right answers means that we believe that there is an absolute, a binary choice when making a decision. There are answers and solutions that are better than others are, just as there are answers and solutions that are not as good as others. There is, however, no singular right way to interact with others and in providing educational opportunities deals with interaction.

The easiest way out will lead back in

Doing effective strategic planning requires making hard decisions. This requires a thorough understanding of the systemic relationships that impact the institution, as well as an understanding of what the future could be, and furthermore takes a commitment to the well-being of the institution as a whole and a focus on the needs of the customers. It takes access to research and data and a commitment to use them. Without these an institution will fall back into the process of developing "easy" goals; goals which will

have little impact on the long-term viability of the institution; goals that will not make a dramatic impact on the customers that the institution is charged with serving.

A third element of a systemic approach to planning is the combination and coordination of both the vision and strategy process. This framework ties together the four major pieces of institutional strategies: financial, institutional processes, learning and growth, and customer needs. In each of these strategies, the connection to vision and goals as well as the other strategies is crucial for an effective planning process. To accomplish this, specific objectives for each strategy must be identified and deployed throughout the institution. This process can best be accomplished using the same methodology that is used in the development of the goals themselves. Dissemination and validation of appropriate goals and their connection to strategies can best be accomplished through the utilization of a matrix that graphically shows the relationships between the goals and strategies.

Without this combination and coordination, the long-term efforts of planning will be mitigated by an institutional inability to connect all the pieces of the "institutional puzzle." A systemic approach to planning enables an institution to examine the dynamics that effect the ability of the institution to move toward its vision, while at the same time effectively satisfy its mission.

Integration with Budget

An institutional planning process that is not connected directly to the budget process may not result in long-term gains and could instead become a disjointed effort that will lead to frustration and minimal success. Budgets should not drive planning in an institution. Budgets are a parameter of the planning process. Budgets are a function of the long-term financial strategy of the institution. Budgets are the vehicle with which the institution can move forward toward its vision, while at the same time satisfying its institutional mission.

In many institutions the budget process has a different cycle than that of long-term strategic planning. This is based on the systemic structure of the institution. To become more effective over time, the decision must be made to bring both cycles into sync. This can be a difficult, painful process for an institutional culture that has for years not seen the visible connection of the two processes. However, it is unreasonable for an institution to believe that without a clear set of strategies that drive the development of budgets, the institutional resources can be applied effectively.

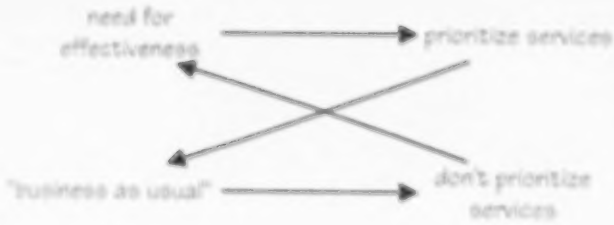
Making the change to a coordinated, integrated budgeting process that is tied directly to strategic initiatives requires that the institution make the often difficult choices of what its priorities are. In the past, when there were readily available resources due to the rapid expansion of institutions across the country, some institutions tried to "be everything to everybody." Budgets were expanded to cover departmental and divisional initiatives that, over time, have proven to be ineffective and resulted in the unavailability of resources to meet the challenges of today. Prioritizing institutional services provides the clarity needed for making decisions as to what strategies are important for today and the future. Included in determining priorities for service include first determining overall institutional philosophical priorities as to whether the institution should focus on either growth, sustaining current size, or reduction of services. Without these service priorities, planning efforts will be fractionalized, resulting in marginalized delivery of services. Eventually this will lead to the demise of both the ability of an institution to meet its customers needs, and eventually the institution itself.

The hardest part of prioritizing institutional services is determining who will set the priorities. In most institutions, setting priorities is perhaps the most politically sensitive decision that is made. Ultimately, setting the priorities for an institution are the decision of the Board of Trustees. The most appropriate way to accomplish the setting of priorities is to have a cross-sectional institutional group set forth recommendations, along with a rationale for the recommendations, and transmit them to the Board of Trustees.

The recommendation must take into consideration the mission of the institution, the mission of the system that the institution is a part of, the current and future demographic projections of the institutional service area, and the resources available, both current and future, for the delivery of services. This work should be developed in conjunction with a look to the various scenarios that the institution may experience in the future.

Implicit in the need for institutional priorities is the need to determine measurable targets for the priorities. These targets need to take into consideration the potential scenarios the institution may encounter.

The key in prioritizing institutional services is the visibility of the approved priorities. Without a high level of visibility as to what is important, departments and divisions will continue to work on efforts that give little leverage to become more effective. A side effect of the prioritization of services is institutional alignment. Making service priorities visible gives the institutional population the ability to know what to focus on. This is important if the institution is to be viable over time.



(figure 4)

Unfortunately, prioritizing services, although requested and needed by all, usually results in making hard, sometimes unpopular decisions. This can be seen in figure 4, the model for structural tension. The basis for this model is that all tension seeks resolution. In the model, the tension of the need for alignment in efforts can be easily resolved by the prioritization of services. However, the tension (need) to continue to try to meet needs as they are identified is resolved by not determining priorities – by continuing to try to "be everything to everybody." The prioritization of services has a negative effect on the

tension created by trying to doing "everything;" and not determining priorities will have a negative effect on the ability to achieve institutional alignment. This structural tension cannot be resolved without making the conscious institutional decision to become more effective through focusing on the vital few things that need to be accomplished based on the multiple parameters of available human, physical, and financial resources available.

Integrating the budget and planning cycles also requires a comprehensive, ongoing planning calendar. This is crucial for several reasons. First, developing a comprehensive planning calendar is a positive systemic structure. Positive structures lead to positive patterns of behavior and trends which, in turn, lead to positive events.

Second, a visible comprehensive planning calendar minimizes the potential for "last minute" reactions to institutional needs by ensuring that everyone's planning efforts will be coordinated over time. The development of an institutional-wide, comprehensive planning calendar can lead to a positive dialogue between the different departments and divisions of an institution as to departmental and divisional needs. Without this dialogue, and the subsequent understanding that comes with true dialogue, institutional and customer needs cannot be met effectively.

The integration of budget and planning, although potentially difficult to accomplish, will lead to a more positive deployment of institutional strategic initiatives across the entire institutio

Deployment

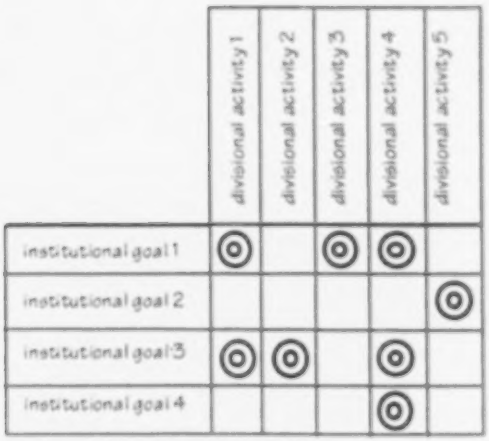
The deployment process of planning has two distinct elements. First, it ensures that all parts of an institution are working on the vital few institutional strategies that are key to institutional success, and therefore customer satisfaction. Second, it creates visibility as to what each department and division is doing to meet those strategies. This has the additional benefit of leveraging efforts and eliminating duplication of efforts.

An effective deployment process is one in which institutional strategies are first identified on an entire institutional level, and then cascaded throughout the entire institutional population. The method for cascading the strategies is based in the rationale that at each level of the institution, the strategies need to be in alignment with the overall institutional goals (see figure 5).

(figure 5)

In figure 5, we see the functional deployment model. The overall goals and strategies are developed by the group charged with strategic planning. These goals and strategies are communicated to the various institutional leadership teams who are charged with developing implementation strategies based on the institutional goals. These in turn are communicated to the various implementation teams of the institution – in most cases, the various departments and divisions. It is important to note that as the deployment process moves throughout the institution, as each level develops their own goals and strategies, they must be in alignment with the next level up (Scott Cypher, The Alignment Project). This ensures alignment with the belief that the institution should only work on the vital few things that will increase the overall effectiveness of the institution.

The way in which this is done has a direct relationship to the effectiveness of the strategies. Institutional success depends on each department and division working on the vital few things that will ensure that the strategies are implemented. Again, the key here is "working on the vital few." The quality of efforts is far more important that quantity. The most effective way in which to accomplish this is through the utilization of a series of matrices (see figure 6).



(figure 6)

The matrices accomplish several things. First, the use of matrices creates visibility as to what each department and division should focus on (Joe Colletti; *Fieldbook on Focused Planning*). The overall institutional strategic initiatives, or goals, are identified. These goals are subsequently placed on a matrix that gives department and divisional heads the ability to develop their activities that are in alignment with the overall institutional initiatives. The departmental and divisional activities are then deployed through the utilization of sub-matrices to departmental and divisional staff for the development of individual activities that will support them.

The matrices create visibility as to what is being done throughout the institution. This is critical to avoid duplication of efforts and to ensure that the entire institution is focused on the institutional strategic priorities that will ensure positive movement toward the vision and satisfaction of the institutional mission. Additionally, the utilization of the matrices format gives the departments and divisions the ability to prioritize their budget needs to be in alignment with the planning initiatives.

The matrix format is also extremely beneficial when departments and divisions focus their efforts on the key strategies of financial, institutional processes, learning and growth, and customer needs. Each department and division needs to identify their

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specific objectives, measures, activities, and responsibilities that correspond to each strategy. The utilization of the matrix format ensures that the identification process makes their activities visible. This will decrease the potential for duplication of efforts and increase the potential for accountability throughout the institution.

Without the utilization of the matrix format, it will be virtually impossible to be able to ensure that activities are focused appropriately – a prerequisite to becoming effective over time.

Measures

Without visible measures, planning may be a waste of effort. Planning without measures of success will result in misguided efforts that will drain institutional efforts over time. Developing measures of effectiveness will ensure that institutional strategies can be developed to provide direction for efforts that will ensure long-term institutional success.

Effectiveness is defined as "the ability to satisfy the institutional mission by meeting customers needs." Measures of effectiveness are the way in which an institution can actually track how well it is doing in this effort. Measurement enables an institution to "better understand what creates success, however they define it, and to effectively manage processes to achieve success." (Anthony Atkinson et al; *Sloan Management Review*)

The purpose of measuring effectiveness is to: 1) help the institution evaluate whether it is receiving the expected contributions from employees and suppliers, as well as the expected returns from customer groups; 2) help the institution evaluate whether it is giving its employees what they need to continue to contribute so that the institution can meet its goals; 3) guide the design and implementation of processes that contribute to goal attainment; and 4) help the institution evaluate its planning and contracts, both implicit and explicit, that it has negotiated with its employees by helping evaluate their effectiveness. (Anthony Atkinson et al; *Sloan Management Review*)

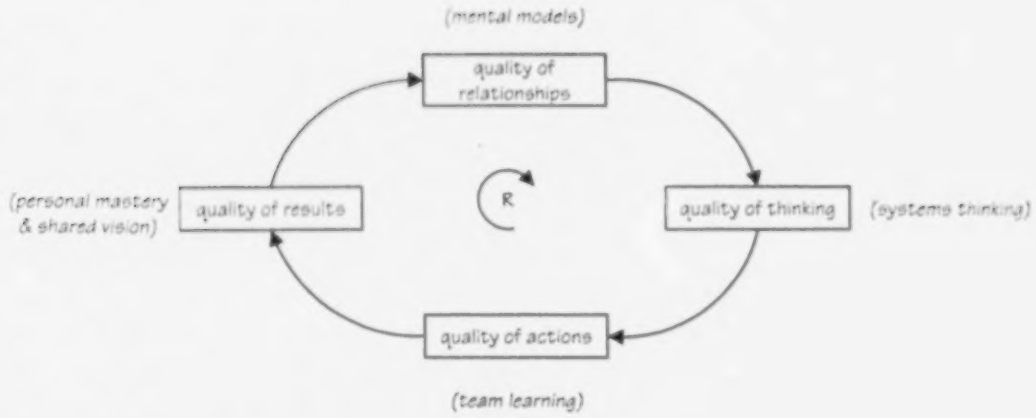
Measures of success in higher educational institutions include facility utilization, achievement of competencies, cost relationships, institutional climate, resource utilization, and customer satisfaction. The application of these measures requires two things – a baseline of current levels and the development of objectives for improvement. Each measure will require a connection to the institutional strategic initiatives, giving the institutional population a basis for its implementation and improvement efforts.

Inherent in the use of strategic measures should be the assumption that the institution is utilizing continuous quality improvement as a way to work. A focus on continuous quality improvement (CQI) means an institutional-wide understanding that continuous quality improvement is not just another program fad that may disappear over time. CQI must be viewed across the institution as simply "the way we do what it is we do." (James Rieley; *Closing the Loop*) This requires shared values as to how an institutional population interacts with each other. These values cannot be just a list of expectations that are placed on the employees of the institution, but in fact must be a shared basis for "how we treat each other." Building shared values and living with them, means at times, behaviors that do not fit the values may be evident until the values become part of the institutional culture. Working on building shared values and living them is everyone's responsibility in an institution and should be included in institutional performance review processes, as well as reflected upon when making all institutional decisions.

Additionally, the use of measures makes the assumption that there will be an application of accountability in the implementation process. Without these two assumptions being in play, measures will be ineffective and lead to the belief that the institutional strategic initiatives are not important. This will result in fractionalization of efforts in low levels of institutional effectiveness.

The use of strategic measures of success leads to overall institutional improvement. This can be seen in figure 6. As the quality of results improve, the ability of the institution to work effectively together improves. This improvement in turn leads to an improvement

in institutional thinking, which will lead to an improvement in overall institutional actions.



(figure 7)

Positive improvement in institutional actions will cause an improvement in the quality of institutional results. As figure 7 shows, each of these loop elements leads to an improvement in the potential for overall success by enhancing utilization of the five disciplines of institutional learning. These five disciplines, when applied in a comprehensive manner, all help to leverage the potential for success.

Conclusion

Strategic planning is something that all institutions need to do – if it is done in a comprehensive, integrated manner. It is important to recognize that the role of strategic planning should not be to determine which programs should be offered, or even which divisions or departments should get which resources. An effective strategic planning process should only set forth the vital few long-term, college-wide, high leverage, measurable strategic goals for the institution.

The development of strategic initiatives that have the potential to create positive movement toward an institutional vision while at the same time satisfy an institution mission are the key to long-term institutional effectiveness and viability. Strategic

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initiatives are only effective, however, if they are developed using a focus on processes and a systems approach. This is a key point. An institution cannot improve "what" it does – it can only improve "how" it does what it does. A systems approach is critical to enable the institution to be able to understand the dynamics at play that impact the institutional ability to effectively implement the initiatives.

In addition, any effective strategic planning process needs to be tied directly to the institutional budget process. Integration of budget and planning is required if the institution is truly serious about increasing its potential for effectiveness as well as avoiding the belief that planning and budget are two different things. Budget is a parameter of planning, and planning is what drives the development of budget.

To ensure that strategic initiatives are met, an effective deployment process is needed. Effective deployment enables an institution to achieve a high level of alignment in the implementation of its strategic initiatives. It also creates a high level of visibility of what each department and division are doing, eliminating the potential for duplication of efforts and increasing the potential for leveraging cross-institutional efforts.

A planning process without measures is nothing more than an exercise. The development of measures enables the planning process to pull together the various strategies required to increase effectiveness and the key success factors for the institution. This is important. If the institution cannot measure how well it is doing developing goals that will be in alignment with its key strategies and key success factors, it will waste resources that could be better applied to satisfy the institutional mission by meeting current and future customer needs – the basis of effectiveness.

Implementing a comprehensive planning model requires several things. It requires a commitment to the key elements of the model, a recognition that without these elements, a planning effort will not be able to provide effective direction to move an institution forward to meet the challenges of the future. It also requires a commitment to training.

Training is not teaching. Training includes providing the clarity of the process to those who will be expected to utilize the process. Training includes enhancing the core capabilities of the planners in the areas of vision, understanding, and thinking in wholes. Training includes facilitating the learning of how to use matrices to make visible the various departmental and divisional efforts. Training includes ensuring that the institutional population understands the rationale for developing a comprehensive plan. Training includes enabling the entire institutional population to move toward a systems approach in all that it does. Training includes re-skilling employees to ensure that they are cross-functional in their abilities.

Implementing a comprehensive planning model also requires time. Institutions and their level of effectiveness are products of the policies and procedures (systemic structures) that have been put in place over time. To create new structures that can assist in enabling institutions to become more effective will require time as well. Unfortunately, there are few institutions in higher education that currently can afford the luxury of time. If higher educational institutions are to become more effective in their abilities to move toward their vision, to satisfy their mission, to meet their current and future customer needs, they must begin to implement a comprehensive planning model today.

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Milwaukee Area Technical College Goal Matrix
FY 1997-1998

Key Strategies					Measures of Effectiveness					
Financial	Institutional Processes	Learning & Growth	Customer Satisfaction	MATC Goals for 1997-1998	Facilities Utilization	Competencies	Cost	Institutional Climate	Resource Utilization	Customer Satisfaction
◎	◎		◎	Improve Overall Planning Process	◎	◎		◎	◎	◎
○	◎		◎	Streamline All College Processes	◎		◎	○	◎	◎
	○	◎	◎	Promote Ownership in the College		◎		◎		◎
◎	○		◎	Maintain Fiscal Stability	◎		◎		◎	◎

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